Guide: Awarding Contracts in COMMBUYS CLM

This guide shows how to:

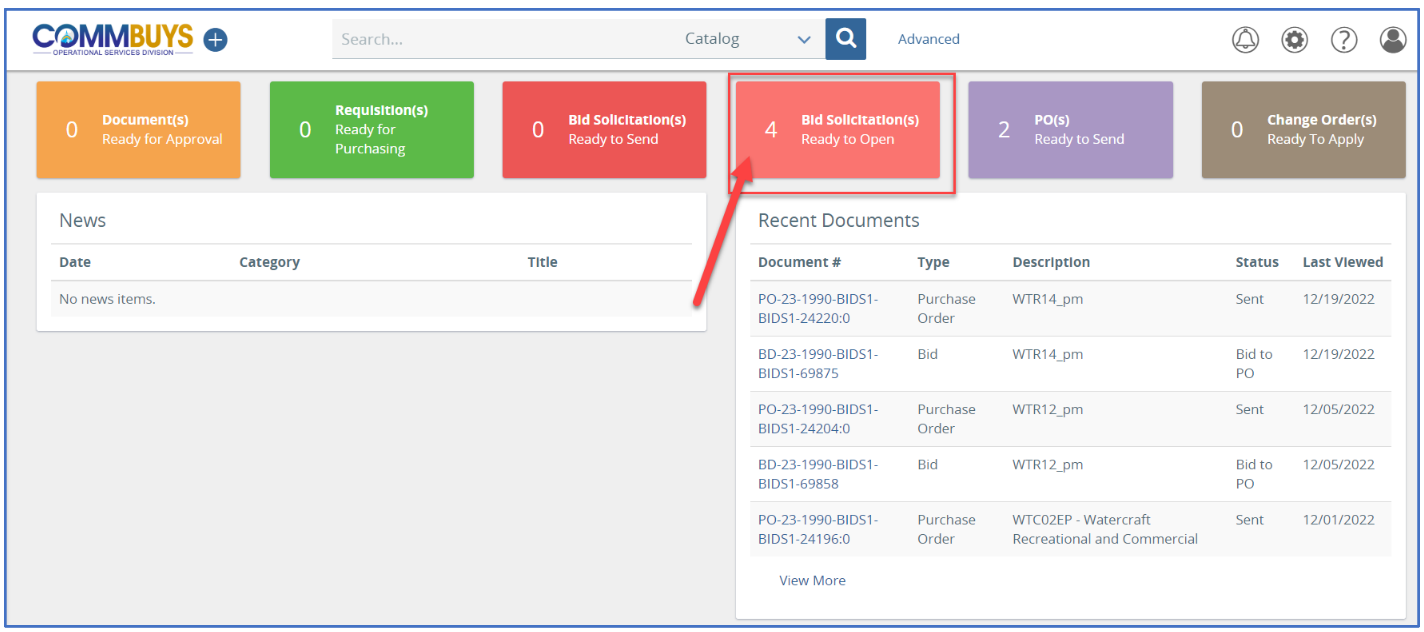
- Open Bid Solicitations in COMMBUYS
- Complete CLM Contract Records
  - Verify vendor records newly ported in from COMMBUYS
  - Create package documents
- Award selected vendors in COMMBUYS and create Master Blanket Purchase Orders

Of Special Note:

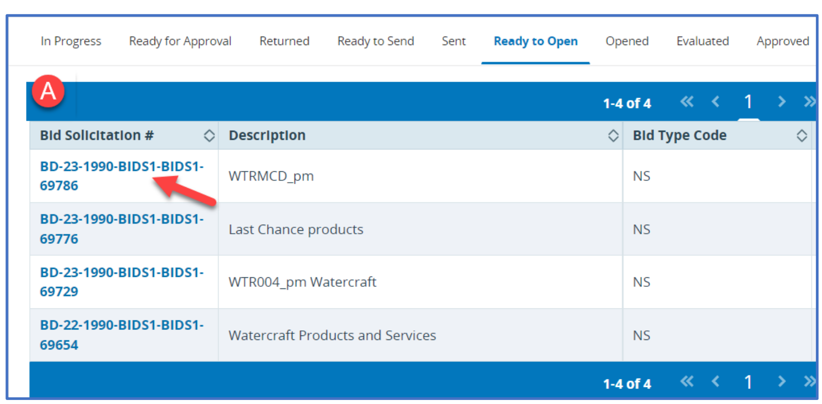
This Guide begins after a bid solicitation's bid opening date has passed. Evaluation of submitted bid responses is not covered here, though the job aid **How to Score and Award a Bid** explains how to use the optional COMMBUYS tool for this purpose. Users must sign in to the COMMBUYS CLM platform using Single Sign On. (See job aid)

From the COMMBUYS Homepage:

1. Find the Bid Solicitation that is ready to open. It may be listed under recent documents but will also be displayed under the **Bid Solicitations Ready to Open** tile.

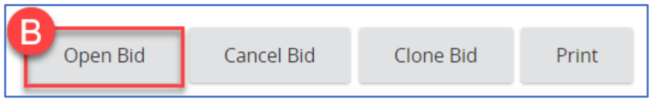


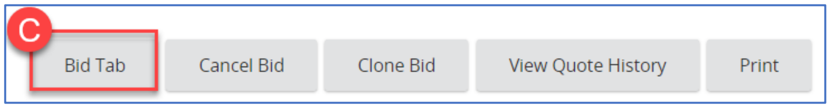
a. Click the hyperlink for the bid you are ready to evaluate. COMMBUYS displays the summary tab of the bid.



b. Scroll down to the bottom of the page and click the **Open Bid** action button.

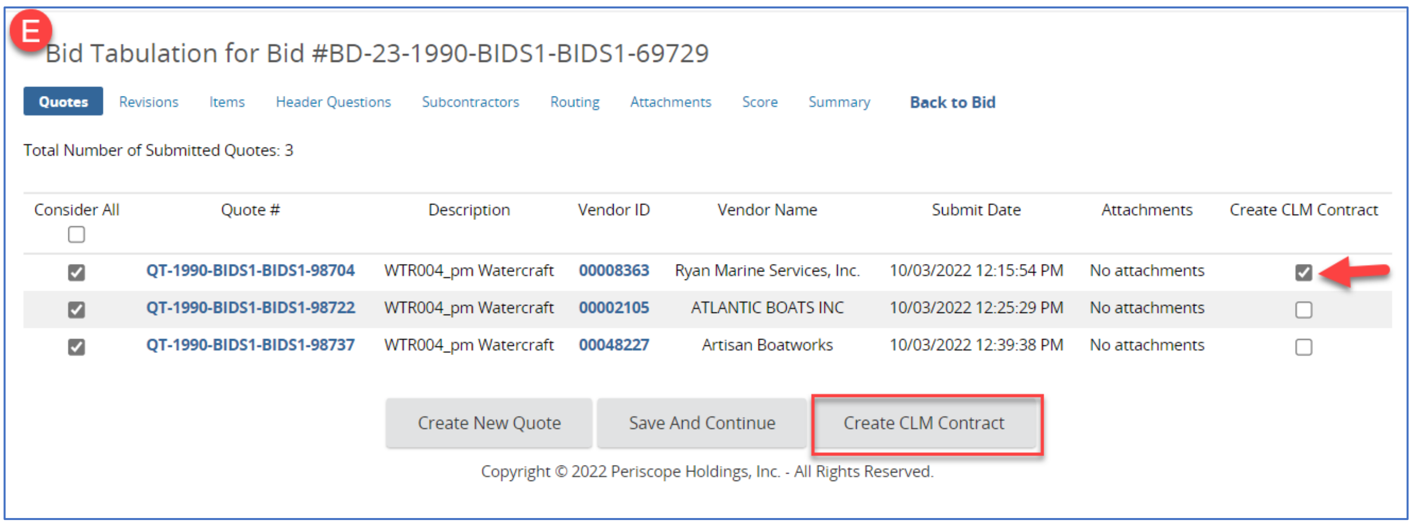
c. Scroll down to the bottom of the page again and click the **Bid Tab** action button.





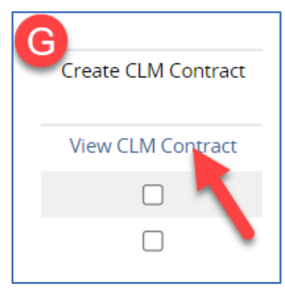
d. The Bid Tabulation page displays the bidders' responses. Download quote responses and distribute for evaluation using the scorecard or evaluation tool developed prior to bid opening. When the apparently successful bidder(s) has been identified, return to the Bid Tab.

e. Select the check box(es) "Create CLM Contract" for the vendor(s) you wish to award, then click the **Create CLM Contract** action button.



f. A pop-up box will confirm that a CLM record has been created. Click **OK**.

g. In place of the checked box is a hyperlink **View CLM Contract**. Click this hyperlink. This will open a draft Vendor Contract in CLM.



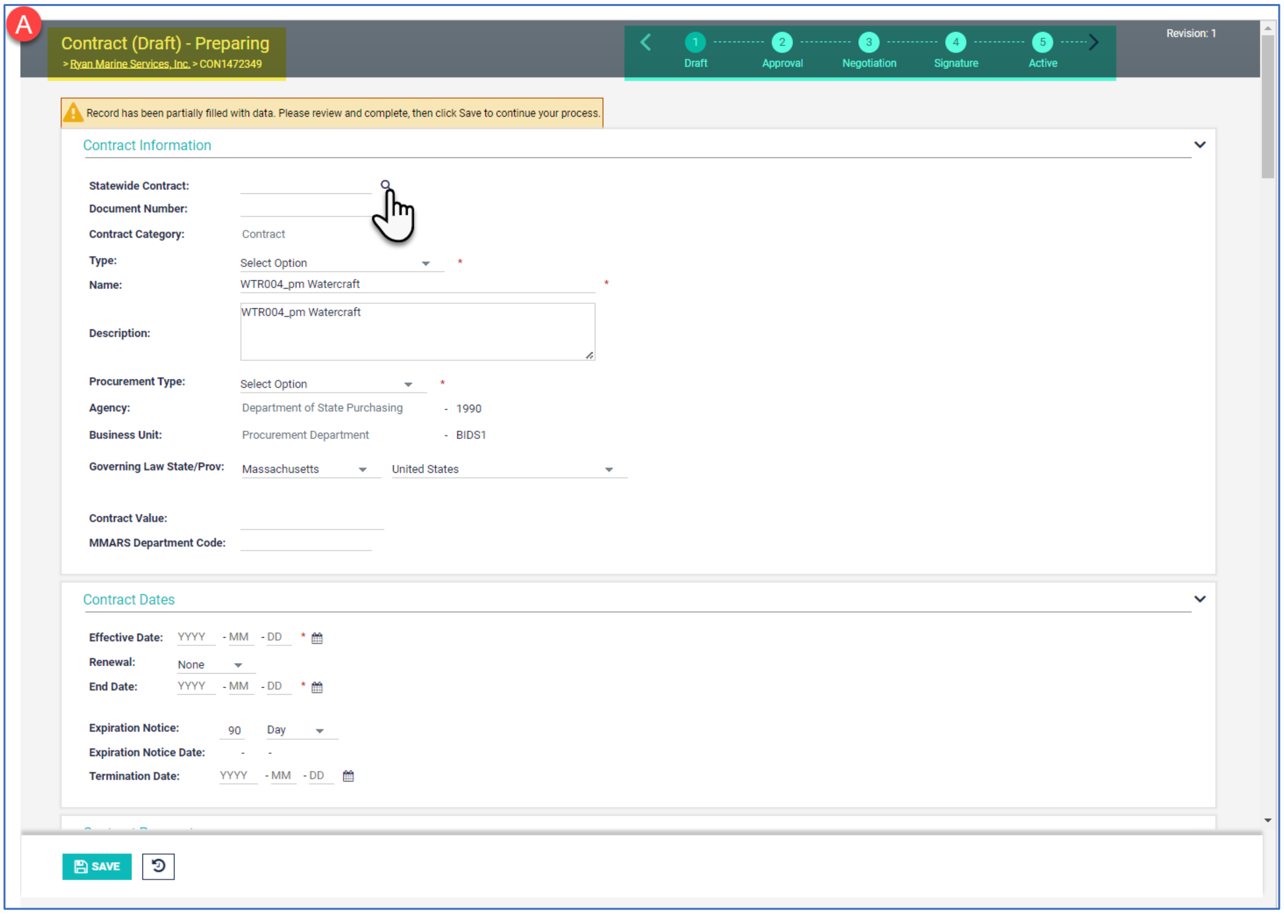
From CLM Draft Contract:

2. The grey ribbon at the top of the page (highlighted in yellow below) shows a Draft Contract that is the **Preparing** phase. The "breadcrumbs" below this information provide a hyperlink to the vendor's CLM record and lists the CLM record number for the draft contract.

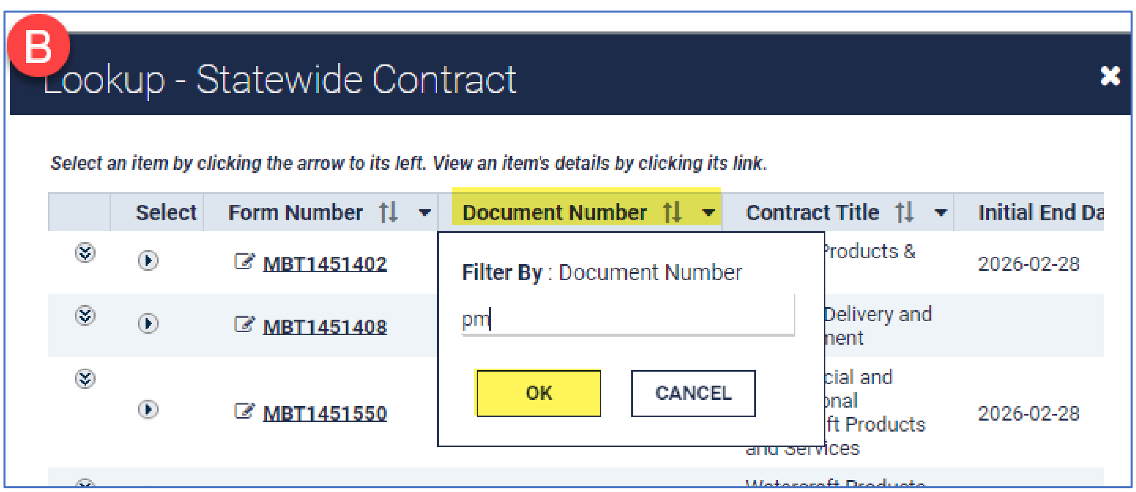
   The workflow on the top right (blue highlight) shows the steps from Draft through to Approval. Some of the data from this Contract Form is injected into the Standard Contract Form Template. Data fields are organized in a series of sections.

   If the selected business already has a vendor record in your organization's CLM, an alert message indicates "the record is partially filled with data." Alternatively, if the vendor's information is being imported to CLM for the first time, the alert will read "Parent record is in preparing state…" and you must complete additional steps before continuing with the steps below.

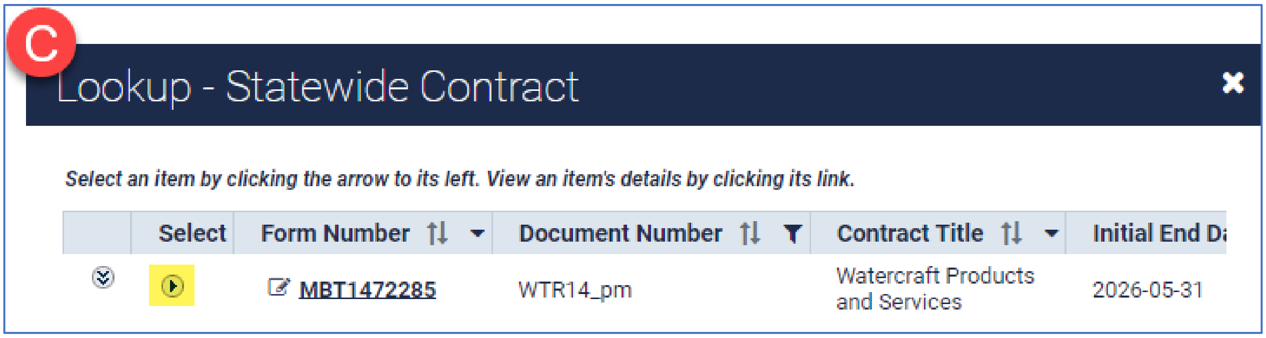
a. The first step is to connect the Contract with information previously gathered for the Strategy and Bid Packages. In the **Contract Information** box, click the magnifying glass (Look-up tool) next to field labeled **Statewide Contract.** Note: the label is incorrect; the field includes all contract types.



b. A pop-up box appears allowing you to look up another record that contains previously entered information. Select the down arrow next to the desired column heading and type in a search term. The example is searching for Document Numbers containing the letters "pm".



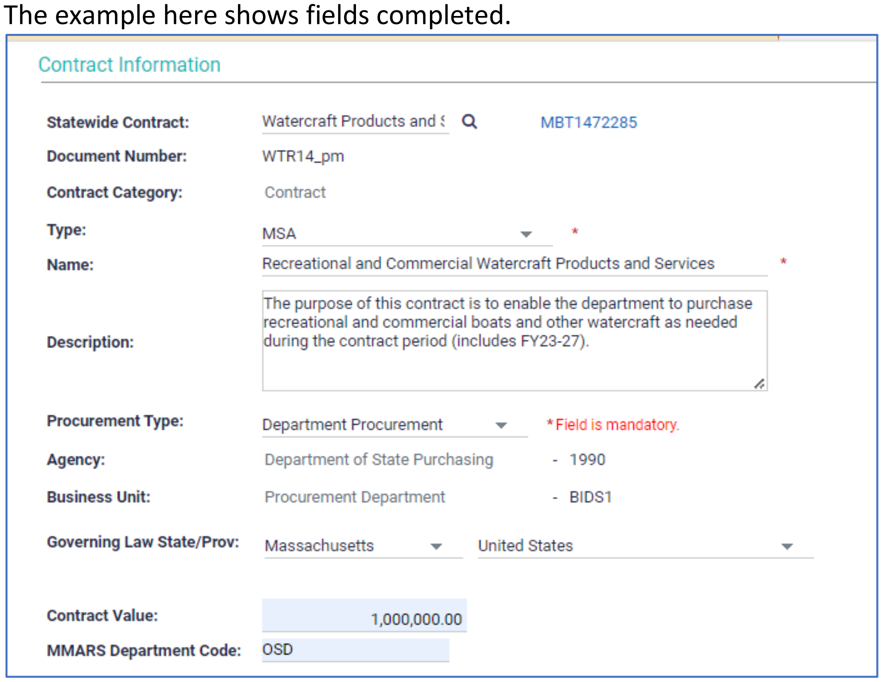
c. Click the icon next to the desired form. The Form Number inserts into the Statewide Contract field, and data from the form inserts into the draft contract.



3. Filling in remaining Contract Information fields. Any field marked with an asterisk must be completed. Other fields are optional.

Field Name	Description
Type	Use the down arrow to display choices and select the most appropriate. Choices are MSA (Master Service Agreement), Departmental, Financial and Non-Financial ISAs, Grant, Single Vendor, and Multi-Vendor
Name	Information from other forms fills in here. However, the data injects into the Standard Contract Form box "Brief Description of Contract Performance or Reason for Amendment". Edit as appropriate.
Description	Description of the Contract. Injects into the Standard Contract Form.
Procurement Type	Use the down arrow to display choices and select the most appropriate. Choices are Statewide Contract (for OSD only), Collective Purchase or Department Procurement. For remaining choices (Emergency Contract, Contract Employee, and Other Procurement Exception), see Procurement Exception Job Aid.
Contract Value:	Insert the estimated contract value if desired. Injects into the Standard Contract Form.
MMARS Department Code	Insert if desired. Injects into Standard Contract Form.

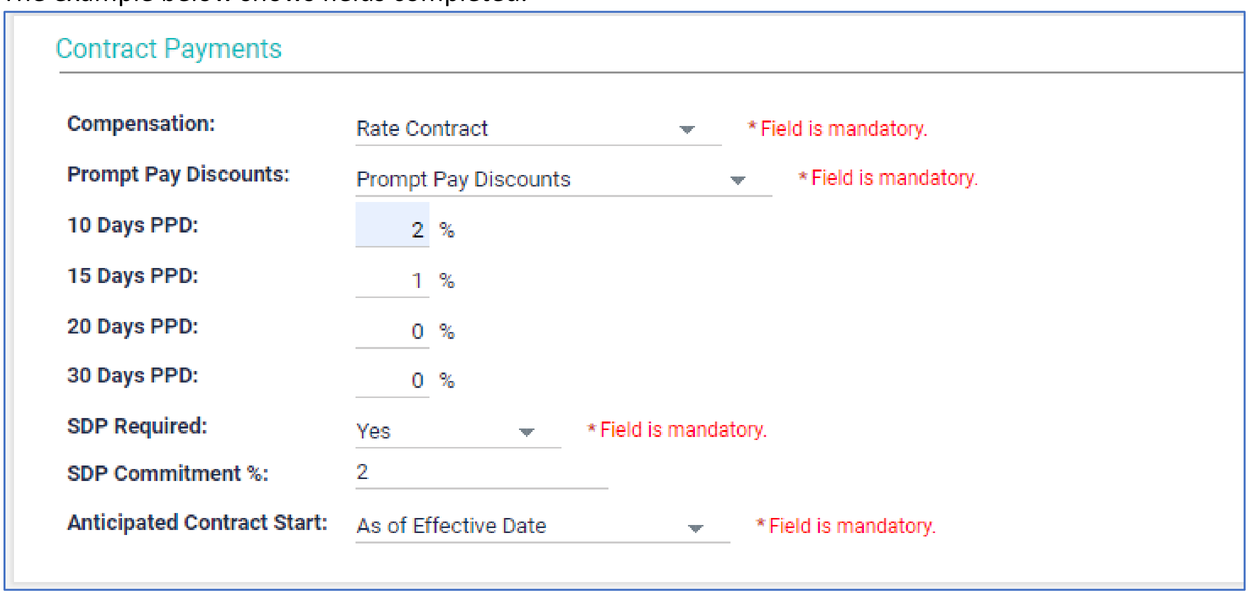
The example here shows fields completed.



4. Filling in the Contract Dates section. Dates should have carried over from previous forms.
5. Filling in the Contract Payments box. All fields must be completed.

Field Name	**Description**
Compensation	Use the down arrow to display choices and select the most appropriate. Choices are Rate Contract or Maximum Obligation Contract.
Prompt Pay Discounts	Field refers to bidder's Prompt Pay commitment. Use the down arrow to display choices and select the most appropriate. Choices are Standard 45 Day Cycle, Statutory/Legal or Ready Payments, Only Initial Payment, and Prompt Pay discounts. If Prompt Pay Discount is selected, enter the percentages the vendor committed to on the Prompt Pay Discount Form.
SDP Required	Use the down arrow to display choices. Select "Yes" if the anticipated expenditure from the contract (including all vendors) will exceed $250K annually. If "Yes" is selected, an additional field for the vendor's SDP Commitment displays. Enter the percentage from the SDP Plan Form. SDP Commitment must be at least 1%.
Anticipated Contract Start	Use the down arrow to display choices and select the most appropriate. Choices are As of Effective Date, Date Later than Effective Date (requires Anticipated Start Date), and Date Earlier than Effective Date (requires Anticipated Start Date).

The example below shows fields completed.


Contract Payments

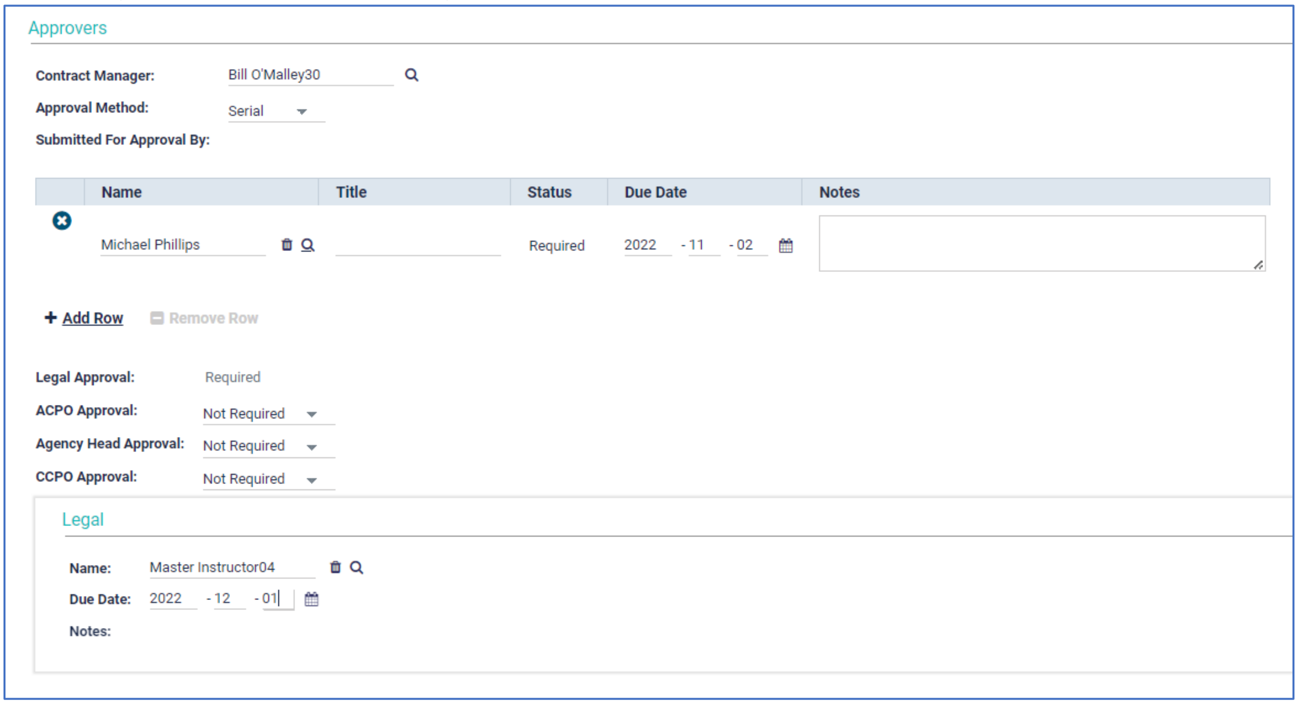
Compensation: Rate Contract *Field is mandatory.
Prompt Pay Discounts: Prompt Pay Discounts *Field is mandatory.
10 Days PPD: 2 %
15 Days PPD: 1 %
20 Days PPD: 0 %
30 Days PPD: 0 %
SDP Required: Yes *Field is mandatory.
SDP Commitment %: 2
Anticipated Contract Start: As of Effective Date *Field is mandatory.

6. The Contract Categories section requires only selecting boxes for the categories the vendor will be awarded. The Addendums, and Notifications boxes are not required and are not covered here.
7. The Contract Document section includes the template for the Standard Contract form. The appearance of the template depends on whether signatures on the form will be obtained electronically (preferred) or through a paper process. Since selecting between these options is not possible at this stage and since additional fields must be filled out before editing can begin, skip over the Contract Document box at this time.

8. Selecting Approvers. This box is identical to the approvers box for other forms.

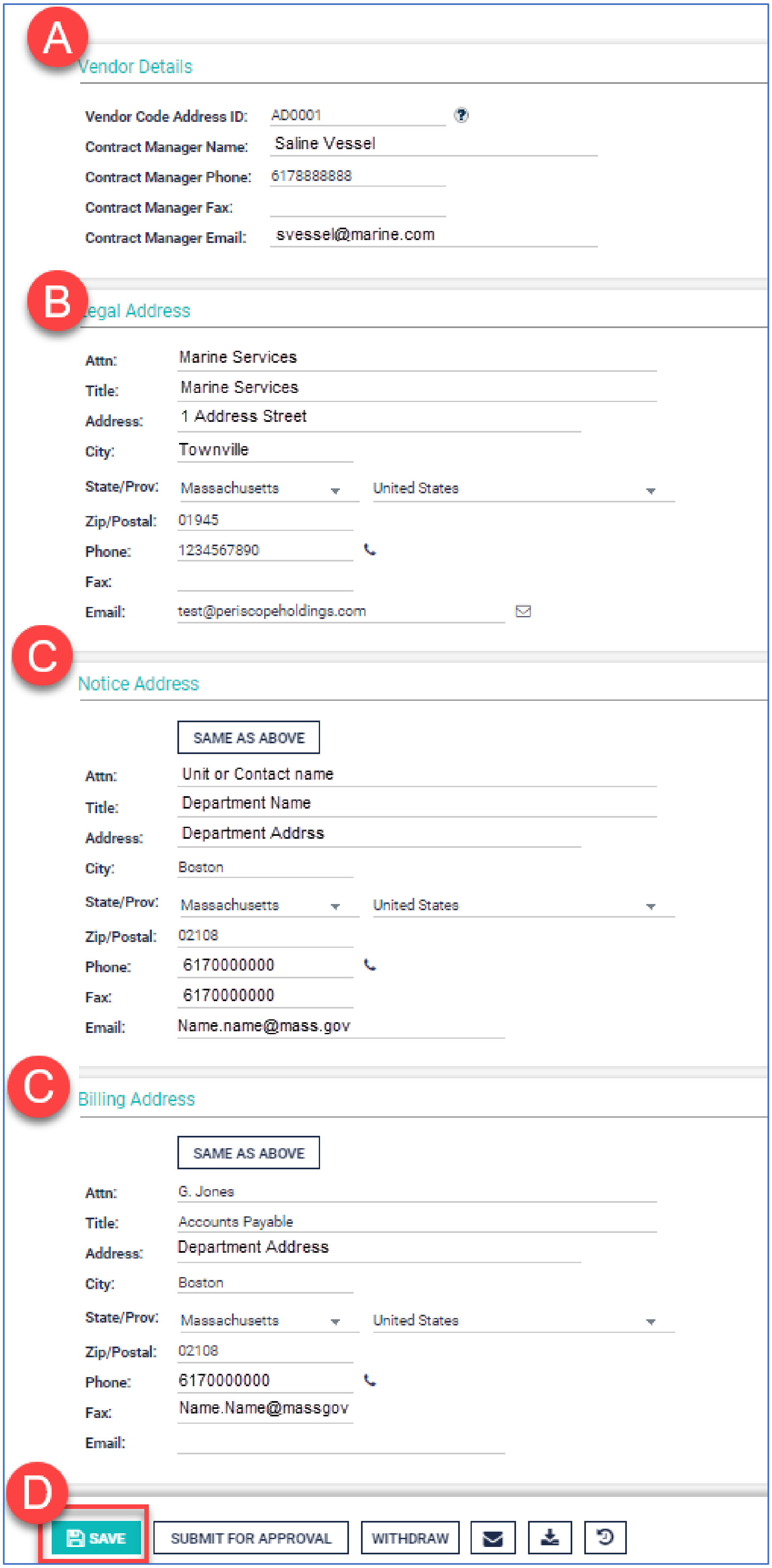
Field Name	Description
Contract Manager	Use the Look-up icon to select the Contract Manager. Do this even if the Contract Manager that appears in the field is correct. Injects into Standard Contract Form.
Approval Method	Use the down arrow to display choices and select the most appropriate. Choices are Serial and Parallel.
Submitted For Approval By	Use the Look-up Tool to find and select approvers. Be sure to enter a due date.
Legal Approver	This is required for the Standard Contract Form. Use the Look-up tool to select an approver, assigned by your agency's Organizational Administrator. Enter a due date.

The example below shows fields completed.



Click **SAVE** at the bottom of the page

9. Skip over the **eSignatures** and **Business Metrics** sections for now.
10. The next three sections involve little data entry.
    a. Filling in the Vendor Details section is not marked "required", though this data injects into the Standard Contract Form. Note that Vendor Code Address ID refers to the vendors MMARS address code and must be set up for Electronic Funds Transfer (EFT) payments.
    b. The Legal Address section should be filled in automatically with data from the Vendor's CLM record.
    c. The Notice Address and Billing Address boxes should be completed with information for your agency. Data entered here injects into the Standard Contract form in the Commonwealth Department Mailing address area and the Commonwealth Department Billing Address boxes.
    d. Click **SAVE** at the bottom of the page. The example below shows the fields completed.

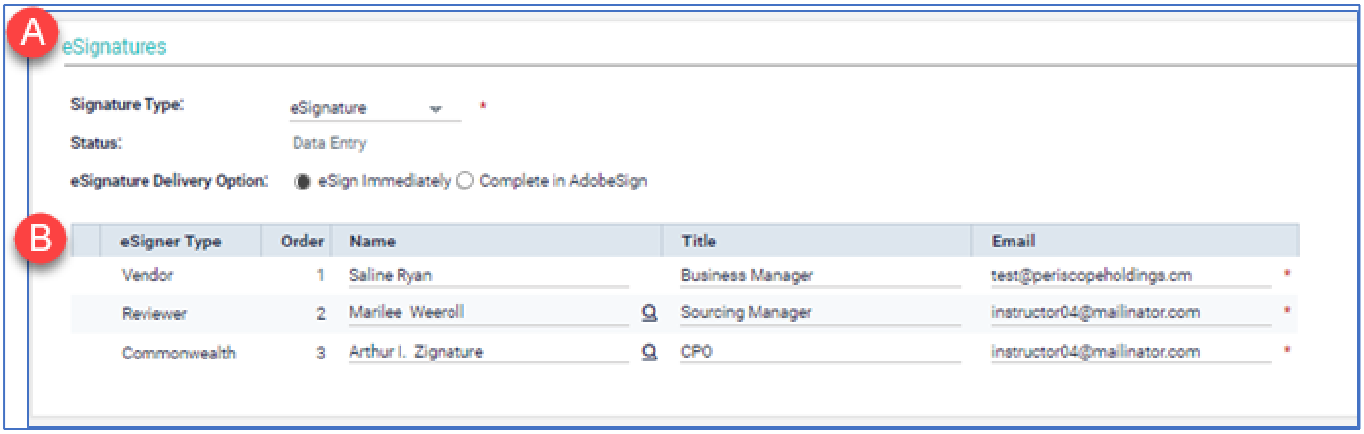

A
Vendor Details
Vendor Code Address ID: AD0001
Contract Manager Name: Saline Vessel
Contract Manager Phone: 6178888888
Contract Manager Fax:
Contract Manager Email: svessel@marine.com
B
Legal Address
Attn: Marine Services
Title: Marine Services
Address: 1 Address Street
City: Townville
State/Prov: Massachusetts United States
Zip/Postal: 01945
Phone: 1234567890
Fax:
Email: test@periscopeholdings.com
C
Notice Address
SAME AS ABOVE
Attn: Unit or Contact name
Title: Department Name
Address: Department Addrss
City: Boston
State/Prov: Massachusetts United States
Zip/Postal: 02108
Phone: 6170000000
Fax: 6170000000
Email: Name.name@mass.gov
C
Billing Address
SAME AS ABOVE
Attn: G. Jones
Title: Accounts Payable
Address: Department Address
City: Boston
State/Prov: Massachusetts United States
Zip/Postal: 02108
Phone: 6170000000
Fax: Name.Name@massgov
Email:
D
SAVE
SUBMIT FOR APPROVAL
WITHDRAW

11. Before returning to the Contract Document section to generate and edit the Standard Contract Form, you must select how the signatures on the document will be gathered. The default template is for an e-sign process; COMMBUYS CLM uses Adobe Sign, which requires an active license assigned to the email of the logged-in user. If a paper process will be used, the template must be changed.

    a. Scroll to the **eSignatures** section. If electronic signatures will be used, leave the default Signature Type **eSignature** and the default eSignature Delivery Option **eSign immediately**.

    b. Enter the Vendor's Authorized Signer information, information for an internal reviewer, and finally, information for the agency's Authorized Signer.

    c. Click **SAVE** at the bottom of the page.



If signatures will be obtained with a paper process, click the down arrow in the **Signature Type** box and select **Paper Signature**. Then click **SAVE** at the bottom of the page, which changes the Contract Template to the paper version.

12. Editing the Standard Contract Form. Return to the Contract Document section which includes a template for the Standard Contract form that matches the signature types you will be collecting.

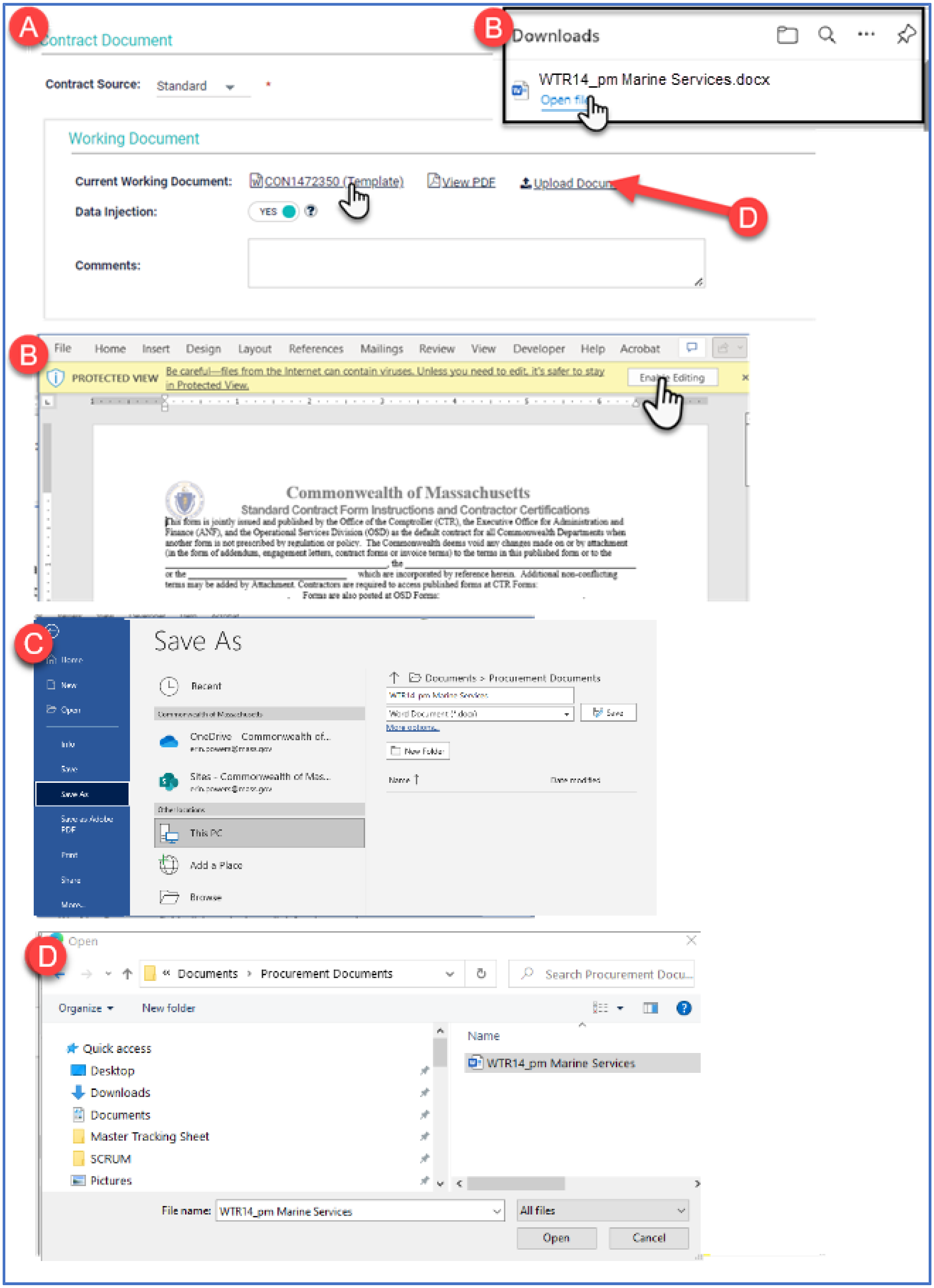
    a. In the **Current Working Document** field, click on the hyperlink for the template. The document downloads. Note the Document name has changed from the template name to reflect the CLM naming convention (in this case, the Document Number of the contract and the name of the business being awarded).

    b. Open the document (Word) and enable editing. Edit the document as needed.

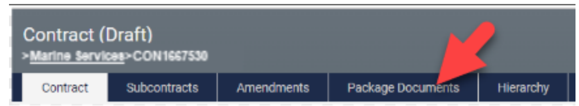
    c. Click **Save** in the Word, leaving the default name in place, or **Save As** to change its location.

    d. Return to the CLM Contract page and click the **Upload** button to replace the template with the new document.

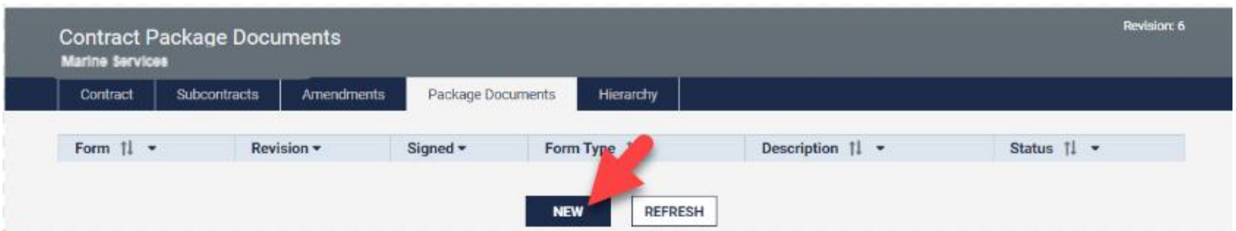
    e. Click **SAVE** at the bottom of the page.


A
Contract Document
Contract Source:
Standard
Working Document
Current Working Document:
CON1472350 (Template)
View PDF
Upload Docum
Data Injection:
YES
Comments:
B
Downloads
WTR14_pm Marine Services.docx
Open file
D
B
File Home Insert Design Layout References Mailings Review View Developer Help Acrobat
PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View.
Enable Editing
Commonwealth of Massachusetts
Standard Contract Form Instructions and Contractor Certifications
C
Save As
Recent
OneDrive Commonwealth of...
Sites - Commonwealth of Mas...
This PC
Add a Place
Browse
Documents > Procurement Documents
D
Open
Documents › Procurement Documents
Search Procurement Docu...
Organize
New folder
Quick access
Desktop
Downloads
Documents
Master Tracking Sheet
SCRUM
Pictures
Name
WTR14_pm Marine Services
File name:
WTR14_pm Marine Services
All files
Open
Cancel

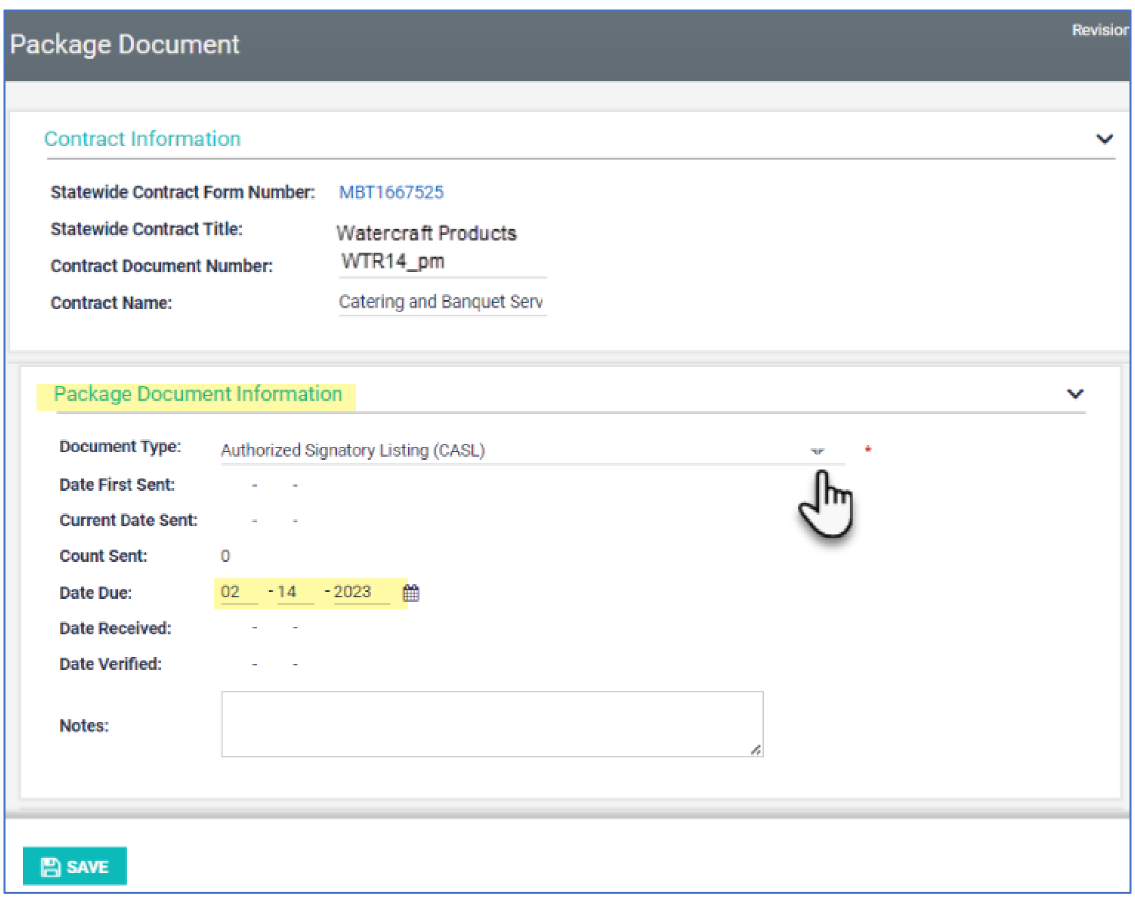
13. Relevant attachments may be uploaded in the **Notes and Attachments** section. Examples include the vendor's final signed SDP Plan Form and Prompt Pay Discount Form, and the Evaluation Scorecard with the business's scores.
14. **Package Documents** include templates for documents that must be signed in order to have a fully executed contract, as well as additional forms that may need to be signed.
    a. At the top of the Draft Contract are several tabs in a navy-blue stripe. **Click** the tab marked **Package Documents**.



    b. When the screen refreshes, the screen title has changed to **Contract Package Documents**. Click the **New Button**. A new window opens labeled **Package Document**. The first information box is pre-filled with data from the draft contract.

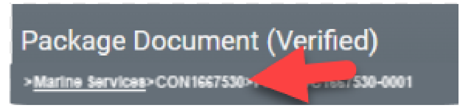


    c. In the **Package Document Information** subsection, select the Document Type from the drop-down menu. Options include Prompt Pay Discount, Supplier Diversity Plan (SDP) Form, Standard Contract Form Instructions and Contractor Certifications, Commonwealth Terms and Conditions for Information Technology Contracts, W-9, Electronic Funds Transfer (EFT), Authorized Signatory Listening (CASL), Vendor Price File, Change of Identity Form, and Other. Also enter a due date, then click **SAVE** at the bottom of the page



d. The page refreshes with a **Contract Document** section for the chosen document. As with other CLM documents, the **Working Document** subsection includes a template (for the chosen package document) to be edited and replaced and an optional **Working Document Collaboration** tool if collaboration is desired for the document.

e. Signatures can be acquired through e-sign (preferred) or by sending printed or electronic documents through other means. Once signatures are received and verified, the Package Document Status changes to **Package Document (Verified)**. **Click** the contract number (CONxxxxxx) in the breadcrumb line to return to the contract draft.



This process can be repeated until all package documents are complete. Required Procurement Folder documents that must be produced in this way are W-9 forms, Contractor Authorized Signatory Listing (CASL) forms, and Electronic Funds Transfer (EFT) forms.

15. Back on the Contract Draft page, click **Submit for Approval** at the bottom of the page. This will send the edited Standard Contract form and the other contents of the Contract Record to the approvers specified in step 8.

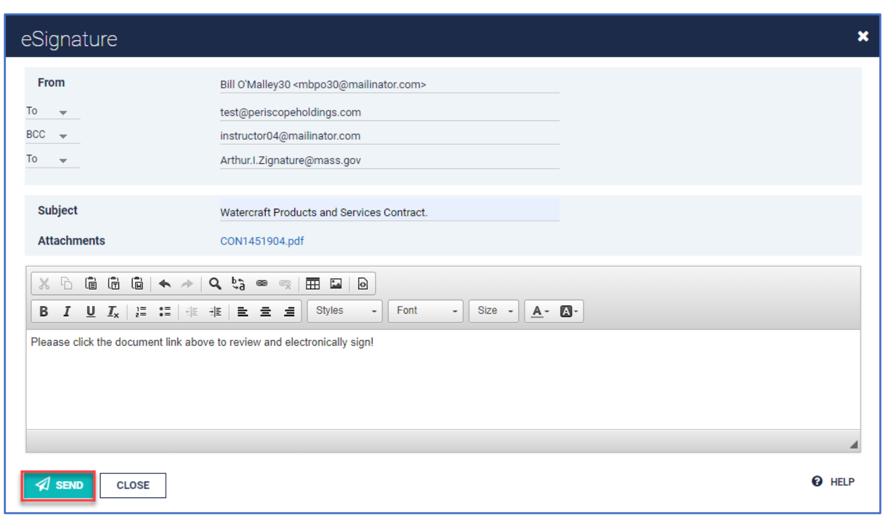
16. Once the Approvals are complete, which may take several days, it's time to send the document around to be signed.

<u>If electronic signatures have been selected</u>;

a. An **ESIGN** button appears at the bottom of the page. Click that button.

b. An email box appears which includes the document to be signed and a space for including a message. Click the **SEND** button and then click **OK** in the warning box.

The ESIGN feature sends the document to each addressee for signature, in order.



If paper signature has been selected, the options are different.

c. A **Sent for Signature** button appears at the bottom of the page. Clicking this button indicates that the approved Standard Contract Form has been sent to the vendor for signature via mail, e-mail, or fax outside of the CLM tool.

d. Once authorized signatures are complete, click the **Signed** button to mark the Standard Contract Form as Signed, and then upload a scanned copy into the CLM **Signed Document** box. Be sure to maintain the CLM assigned document name.

17. Once the documents are signed and so indicated in CLM, the Contract is complete. The gray bar at the top of the page indicates the Contract is Executed (yellow highlight) and Active (blue highlight). The next step is awarding the Bid in COMMBUYS and creating a Master Blanket Purchase Order.

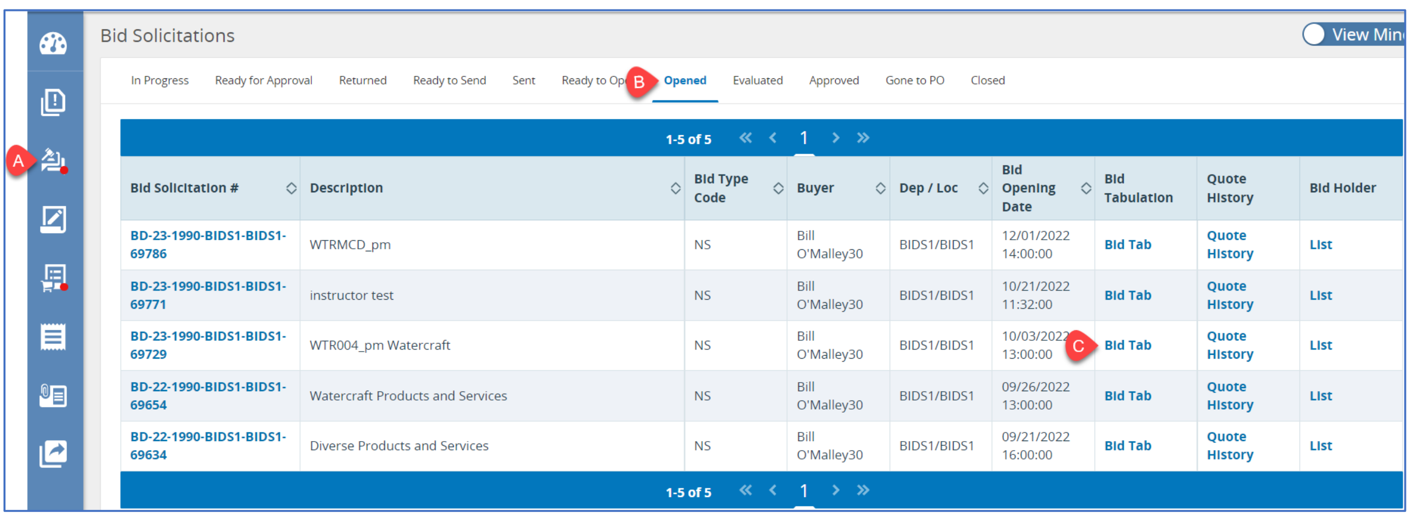
From the COMMBUYS Homepage: Awarding and Creating MBPOs

18. Return to the Bid Solicitation's bid tab. The Bid Solicitation may be listed under recent documents, or you may find it by:

a. Clicking the Bid icon in the blue bar on the left side of the page;

b. Selecting the **Opened** tab;

c. Clicking the **Bid Tab** hyperlink in the row for the bid you are ready to award.



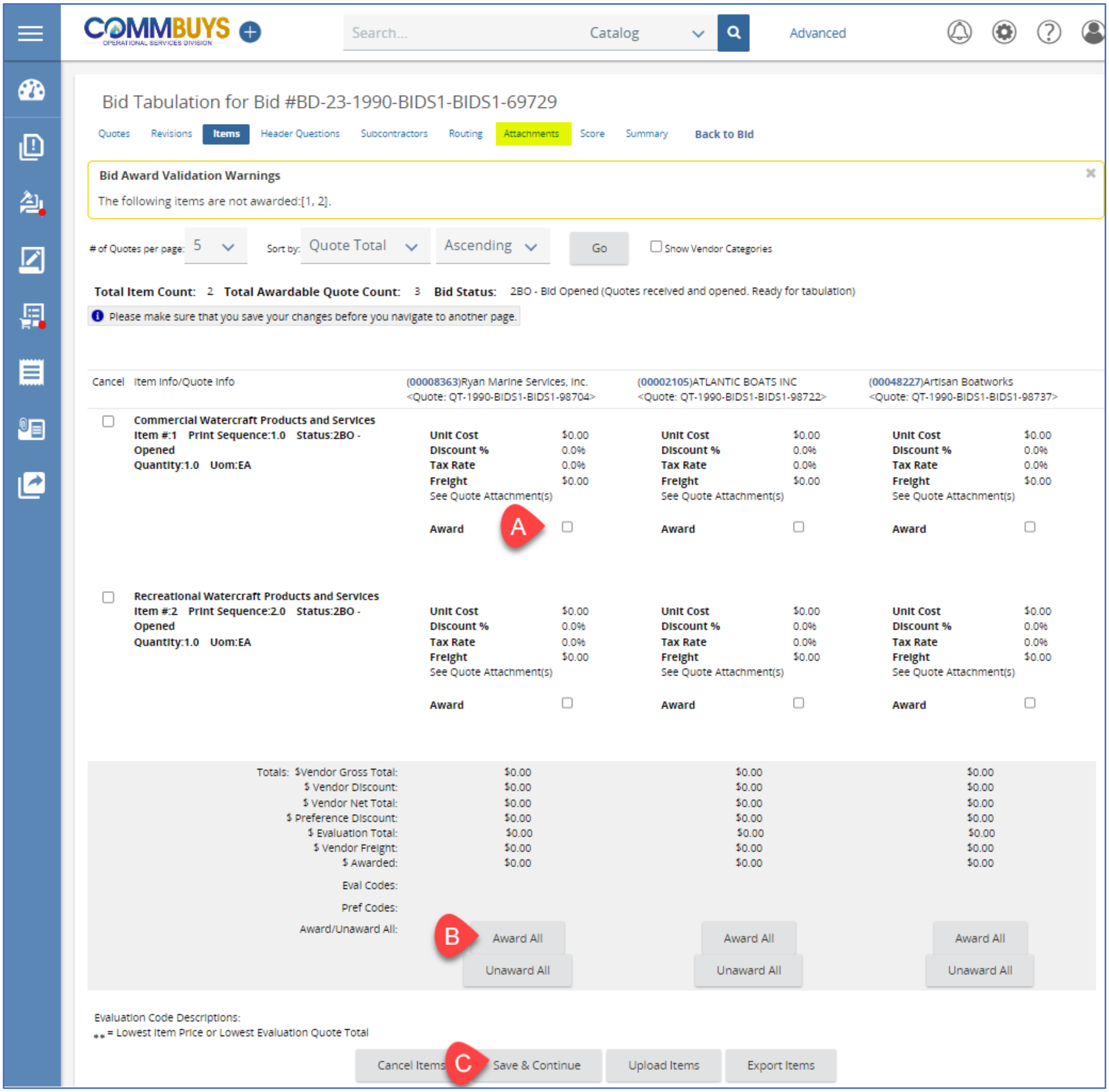
Bid Solicitation #	Description	Bid Type Code	Buyer	Dep / Loc	Bid Opening Date	Bid Tabulation	Quote History	Bid Holder
BD-23-1990-BIDS1-BIDS1-69786	WTRMCD_pm	NS	Bill O'Malley30	BIDS1/BIDS1	12/01/2022 14:00:00	Bid Tab	Quote History	List
BD-23-1990-BIDS1-BIDS1-69771	instructor test	NS	Bill O'Malley30	BIDS1/BIDS1	10/21/2022 11:32:00	Bid Tab	Quote History	List
BD-23-1990-BIDS1-BIDS1-69729	WTR004_pm Watercraft	NS	Bill O'Malley30	BIDS1/BIDS1	10/03/2022 13:00:00	Bid Tab	Quote History	List
BD-22-1990-BIDS1-BIDS1-69654	Watercraft Products and Services	NS	Bill O'Malley30	BIDS1/BIDS1	09/26/2022 13:00:00	Bid Tab	Quote History	List
BD-22-1990-BIDS1-BIDS1-69634	Diverse Products and Services	NS	Bill O'Malley30	BIDS1/BIDS1	09/21/2022 16:00:00	Bid Tab	Quote History	List

19. Awarding the items. In the Bid Tabulation area, click the **Items** tab. All bidders are represented in columns while the items or categories from the Bid Solicitation are displayed in rows.

a. In the column for the vendor for whom you have an executed/active contract, select the checkbox for the item(s)/category(ies) you are awarding.

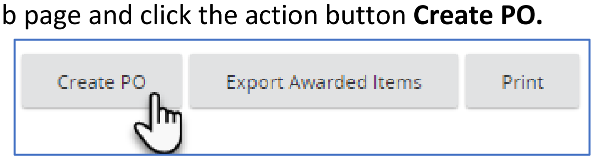
b. If a vendor is being awarded all items/categories, click on the **Award All** button in the vendor's column.

c. Click **Save & Continue**.



NOTE: The **Attachment Tab** (highlighted) may be used to upload files such as a list of all bidders with their evaluation scores.

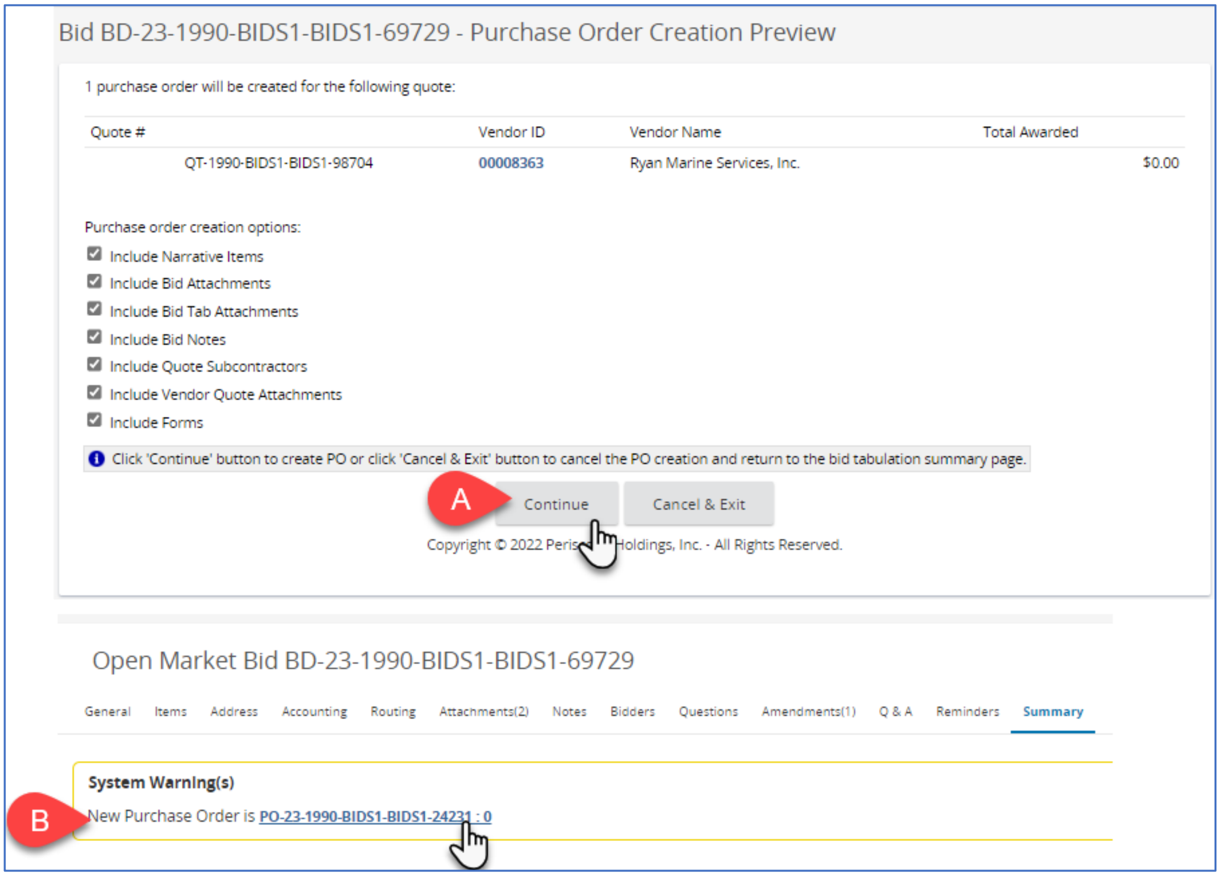
20. From the **Summary Tab**, click **Submit for Approval.** An approval box populates. Click **Save & Continue**.
21. Once approval is secured, which may take some time, return to the Bid Tab of the Bid Solicitation. Scroll to the bottom of the Summary Tab page and click the action button **Create PO.**



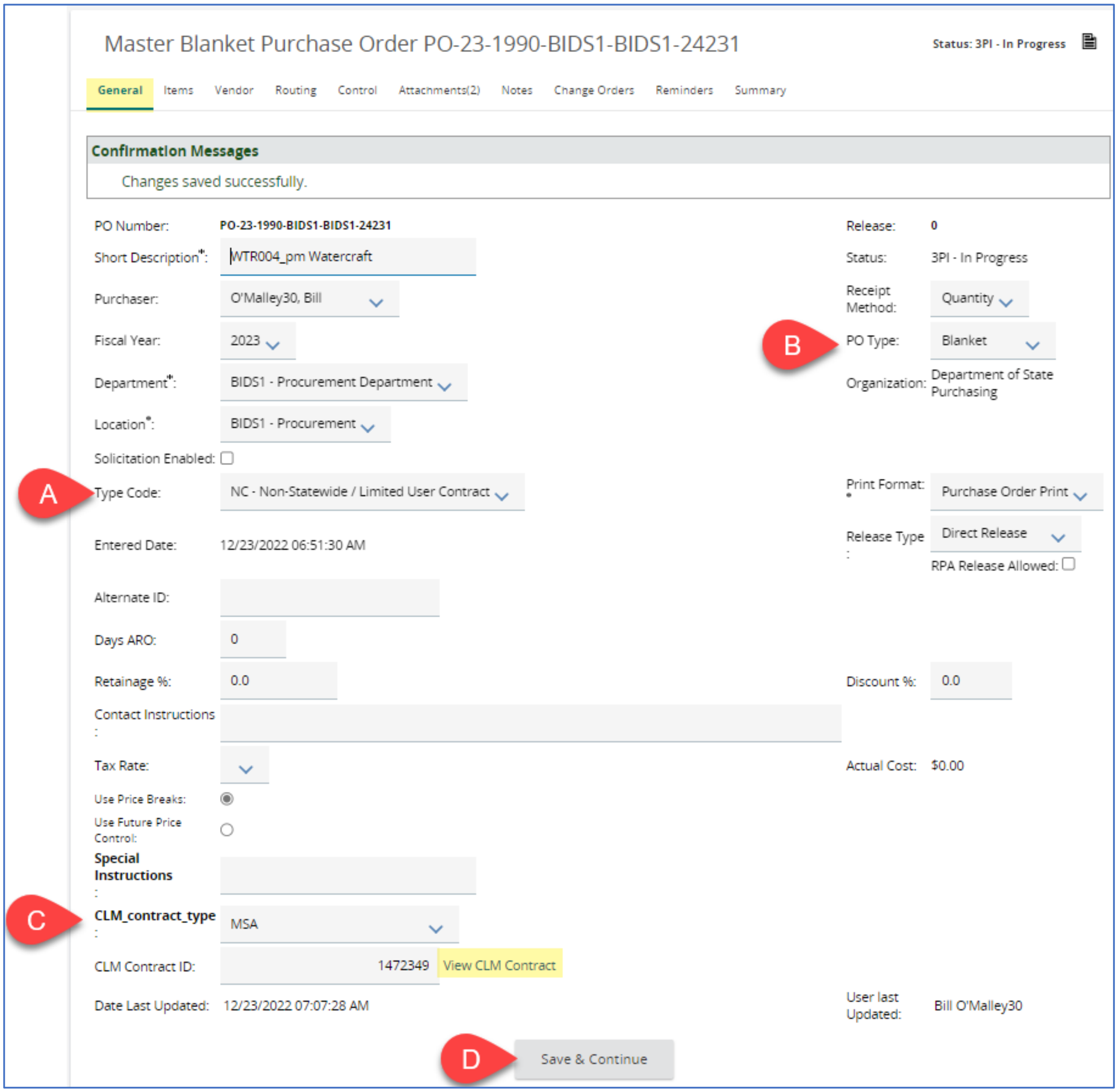
22. A Purchase Order Creation Preview Populates.

   a. Click **Continue**. A system warning will display while COMMBUYS processes the new MBPO.

   b. Click the hyperlink for the New Purchase Order.



23. The new Master Blanket Purchase Order displays the Summary Tab. Click the **General Tab**.
    a. Edit fields as appropriate. Select the **Type Code**.
    b. Select PO **Type**. If the contract is a blanket agreement with many potential purchases and engagements over the life of the contract, select **Blanket.** If the contract involves a one-time purchase, select **Open Market**.
    c. In the field market **Contract Type**, select the type that matches the CLM Record. Note a link to the vendor's CLM record appears next to this field.
    d. Click **Save & Continue**



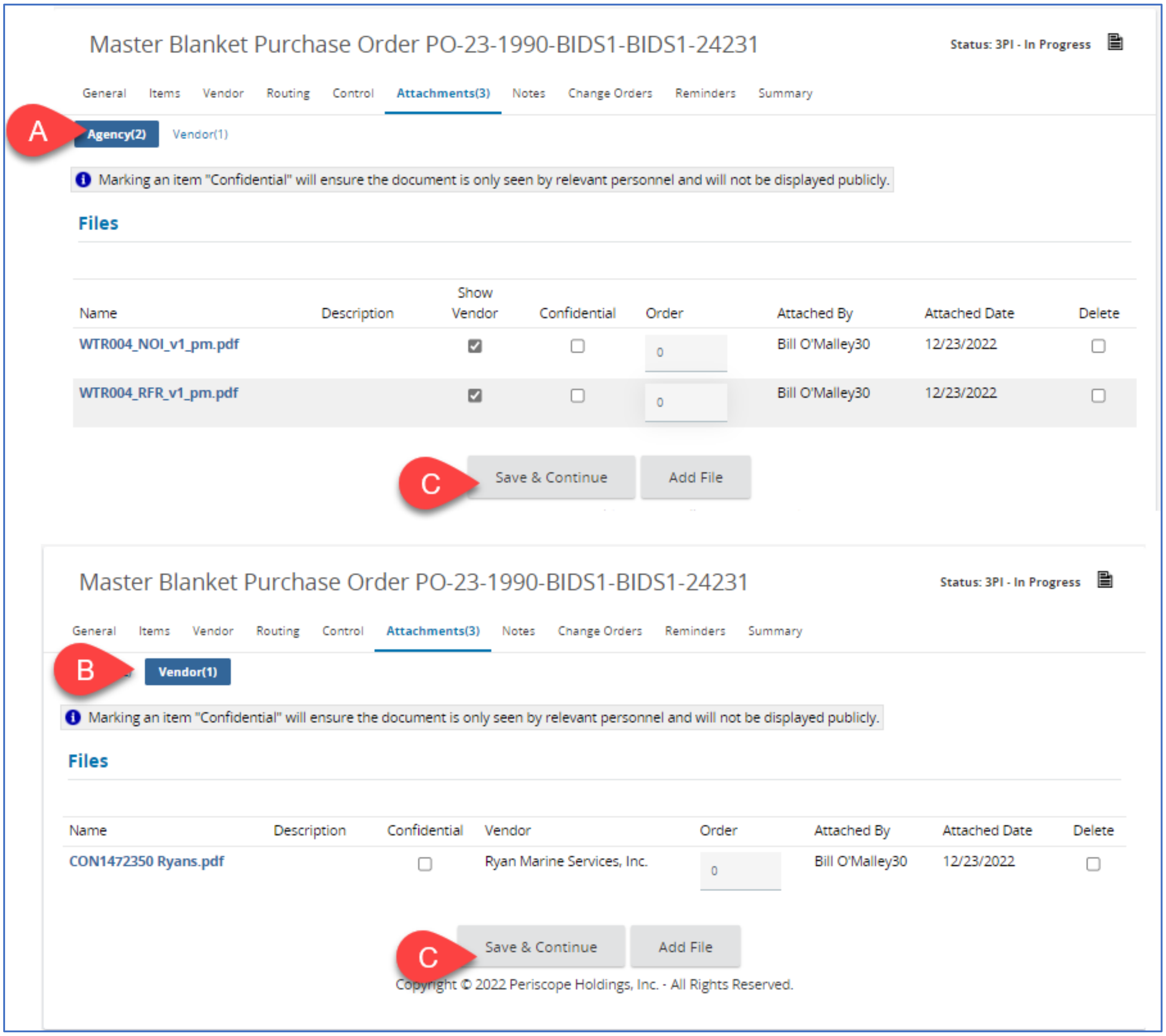
24. Click the **Attachments Tab**. Agency Files that were part of the Bid Solicitation display here.

   a. Add additional agency files if desired. Most Contract Documents must be stored in CLM, so including them with the MBPO is not required. (Evaluation Form, signed W-9, Contractor Authorized Signatory Listing, Electronic Funds Transfer, and Prompt Pay discount)

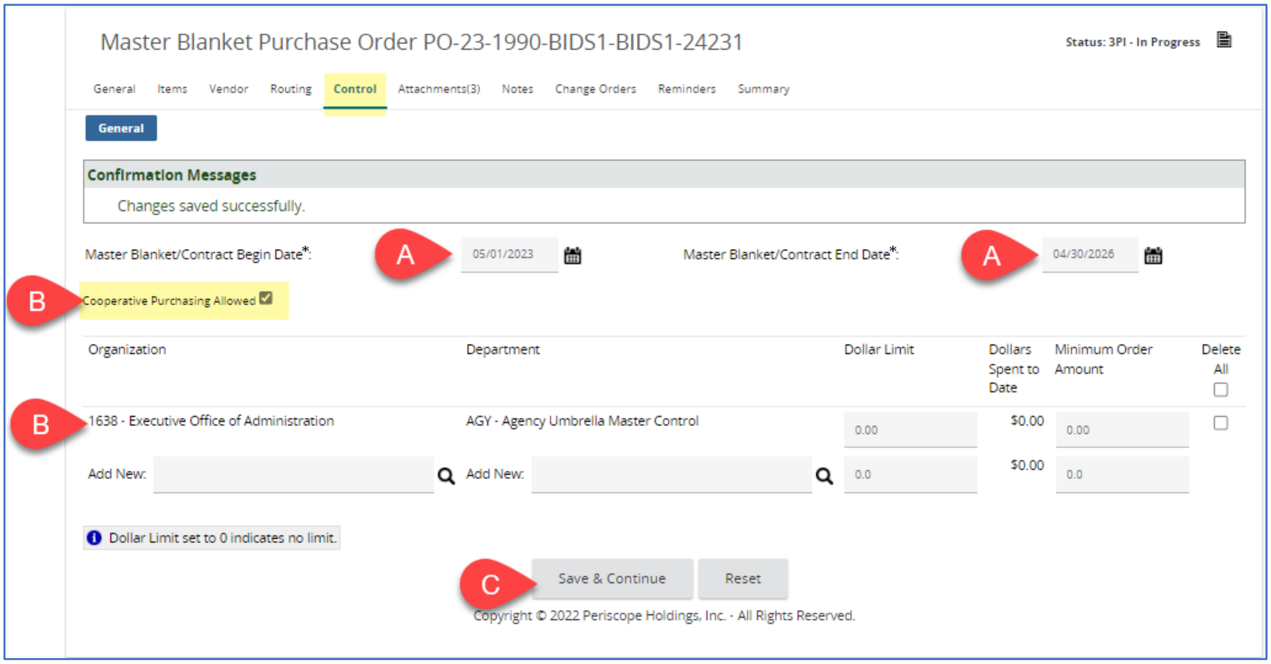
   b. Click the **Vendor Subtab**. Add vendor files if desired.

   c. Click **Save & Continue** after documents have been added to either subtab.

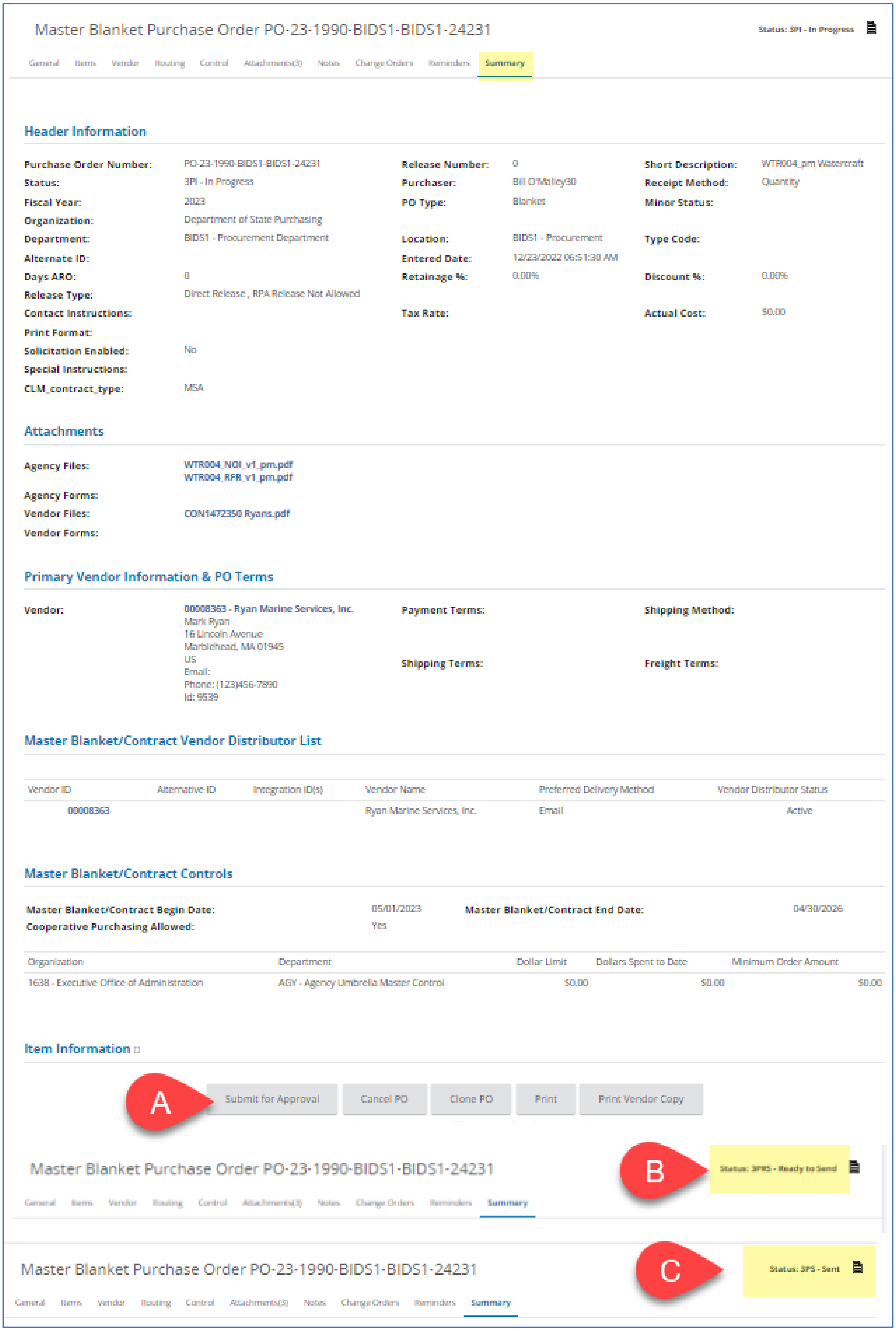
   NOTE: While files may be marked "confidential," only documents that meet Open Records Act/Freedom of Information Act exceptions are exempt from Public Records Requests to view documents.



25. If the contract is a **Blanket** agreement, it is also necessary to complete the **Control** tab.
    a. Enter the begin and end dates for the contract.
    b. If one or more other organizations were namedin the RFR as potential users of the contract, click the Cooperative Purchasing Checkbox, then use the magnifying glass to find and select those named organizations and departments.
    c. Click **Save & Continue**



26. From the **Summary Tab**, review the information displayed. (See next page for illustration)
    a. When everything is as it should be, click **Submit for Approval**.
    b. After approval has been sent and received, the MBPO will be in **Ready to Send** status. Click **Save & Continue.**
    c. The status changes to **Sent**. The MBPO has been sent to the vendor/contractor. The Bid Solicitation is marked as awarded with the vendor identified. All other bidders are sent notices of the award. The MBPO is accessible through the public view of COMMBUYS.

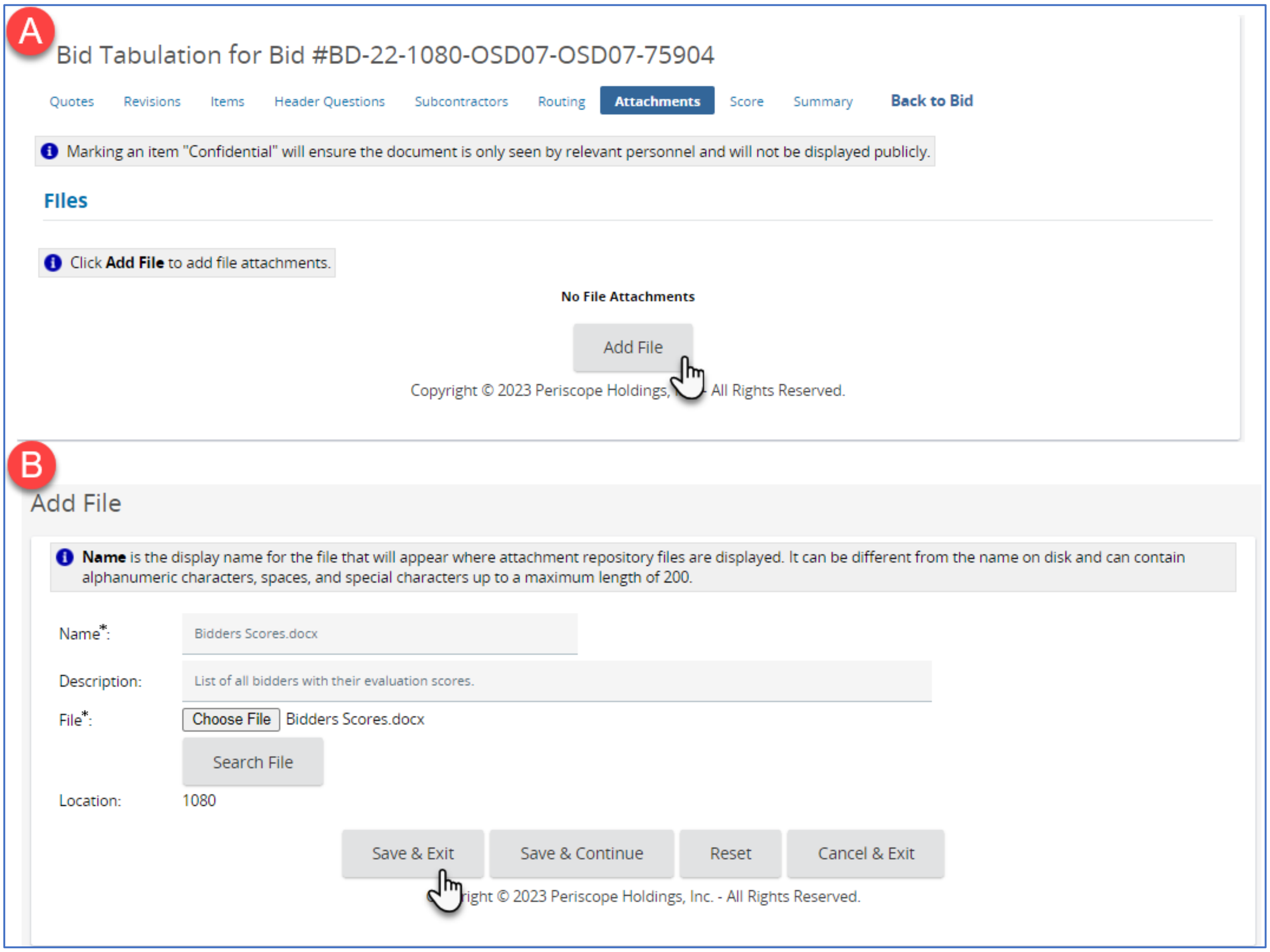

Master Blanket Purchase Order PO-23-1990-BIDS1-BIDS1-24231
Status: 3PI - In Progress
General
Items
Vendor
Routing
Control
Attachments(3)
Notes
Change Orders
Reminders
Summary
Header Information
Purchase Order Number: PO-23-1990-BIDS1-BIDS1-24231
Status: 3PI - In Progress
Fiscal Year: 2023
Organization: Department of State Purchasing
Department: BIDS1 - Procurement Department
Alternate ID:
Days ARO: 0
Release Type: Direct Release , RPA Release Not Allowed
Contact Instructions:
Print Format:
Solicitation Enabled: No
Special Instructions:
CLM_contract_type: MSA
Release Number: 0
Purchaser: Bill O'Malley30
PO Type: Blanket
Location: BIDS1 - Procurement
Entered Date: 12/23/2022 06:51:30 AM
Retainage %: 0.00%
Tax Rate:
Short Description: WTR004_pm Watercraft
Receipt Method: Quantity
Minor Status:
Type Code:
Discount %: 0.00%
Actual Cost: $0.00
Attachments
Agency Files: WTR004_NOI_v1_pm.pdf
WTR004_RFR_v1_pm.pdf
Agency Forms:
Vendor Files: CON1472350 Ryans.pdf
Vendor Forms:
Primary Vendor Information & PO Terms
Vendor: 00008363 - Ryan Marine Services, Inc.
Mark Ryan
16 Lincoln Avenue
Marblehead, MA 01945
US
Email:
Phone: (123)456-7890
Id: 9539
Payment Terms:
Shipping Terms:
Shipping Method:
Freight Terms:
Master Blanket/Contract Vendor Distributor List
Vendor ID
Alternative ID
Integration ID(s)
Vendor Name
Preferred Delivery Method
Vendor Distributor Status
00008363
Ryan Marine Services, Inc.
Email
Active
Master Blanket/Contract Controls
Master Blanket/Contract Begin Date: 05/01/2023
Cooperative Purchasing Allowed: Yes
Master Blanket/Contract End Date: 04/30/2026
Organization
Department
Dollar Limit
Dollars Spent to Date
Minimum Order Amount
1638 - Executive Office of Administration
AGY - Agency Umbrella Master Control
$0.00
$0.00
$0.00
Item Information
A
Submit for Approval
Cancel PO
Clone PO
Print
Print Vendor Copy
Master Blanket Purchase Order PO-23-1990-BIDS1-BIDS1-24231
B
Status: 3PRS - Ready to Send
General
Items
Vendor
Routing
Control
Attachments(3)
Notes
Change Orders
Reminders
Summary
Master Blanket Purchase Order PO-23-1990-BIDS1-BIDS1-24231
C
Status: 3PS - Sent
General
Items
Vendor
Routing
Control
Attachments(3)
Notes
Change Orders
Reminders
Summary

27. A complete Procurement File includes a list of all Bidders with their evaluation total scores. Produce a list and then upload it to the Bid Tab.

    a. Return to the Bid Tab and click the **Attachments** tab.

    b. Click **Add file**, then in the Add File screen, select and upload the desired document. Click **Save & Exit.**

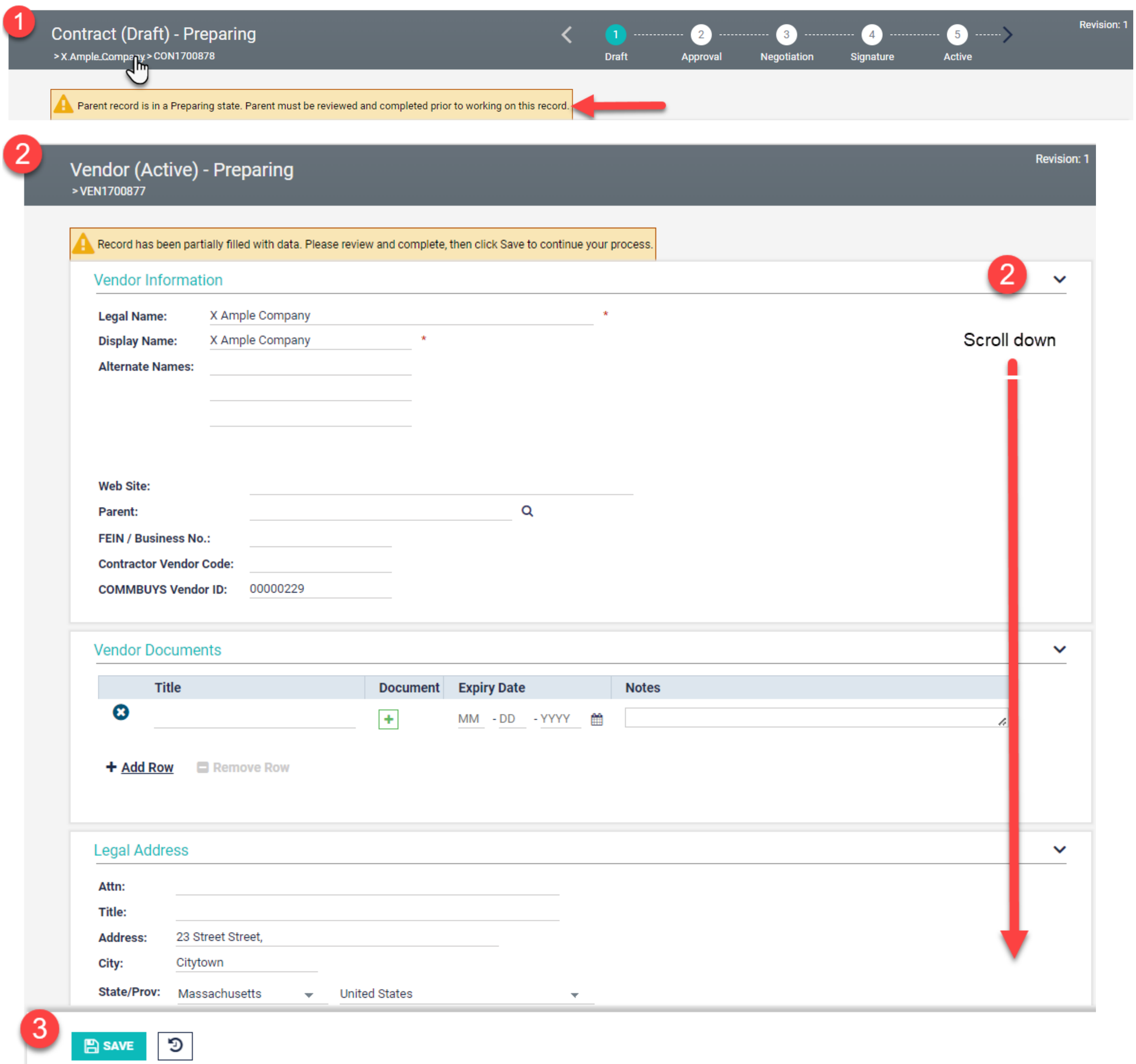
       Note: If the Attachments tab does not present an **Add File** button, the Bid Tab is “closed.” Click the **Summary Tab** and click the action button to **Reopen**, then return to the Attachments tab to upload the list.



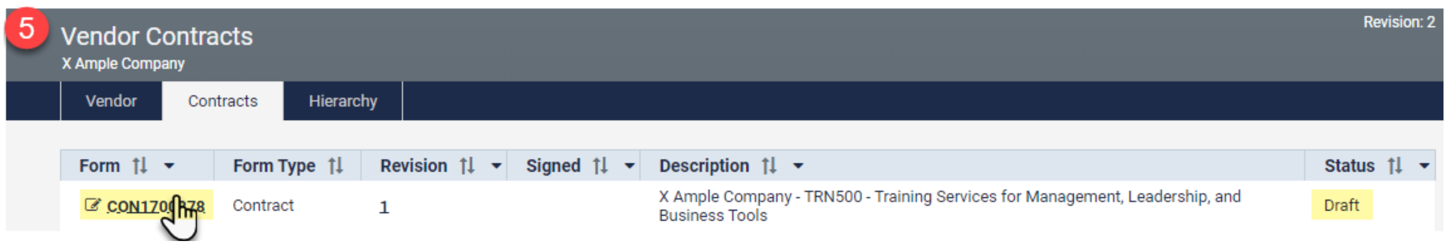
Verifying Vendors

When awarding a contract to a vendor that has not been previously entered into your organization's CLM data, a warning message reading "Parent record is in the Preparing state" displays. This means that data has been ported over from COMMBUYS. You must verify the data before you can proceed with awarding the contract.

1. In the gray ribbon at the top of the page, notice the label **Contract (Draft) Preparing**. Just below that note "breadcrumbs", hyperlinks for the Vendor record and the Contract record. Click the hyperlink for Vendor record.
2. The **Vendor** record in **Preparing** status displays. Check the information in the record against information you have gathered from the vendor's quote response and from MMARS, if applicable. Scroll down to change information as necessary.
3. Click the **Save** button, even if you have made no changes.



4. After the page refreshes, the label in the gray ribbon shows **Vendor (Active)**. Click the **Contracts Tab**.
5. The Contracts tab displays. Since the vendor has not previously been awarded a contract through CLM with your organization, only one contract, the one you are working on, appears. Notice the status is **Draft**. **Click** the hyperlink for the Contract form.



6. The Contract page displays once again. [Return to directions for awarding the contract.]